Benefits Job Aid

BN361 Enrollment Steps for an Employee

Enrollment Steps for an Employee Overview

This Job Aid provides a walkthrough of the enrollment steps for an employee through both New Hire and Open Enrollment processes in Cardinal Employee Self-Service.
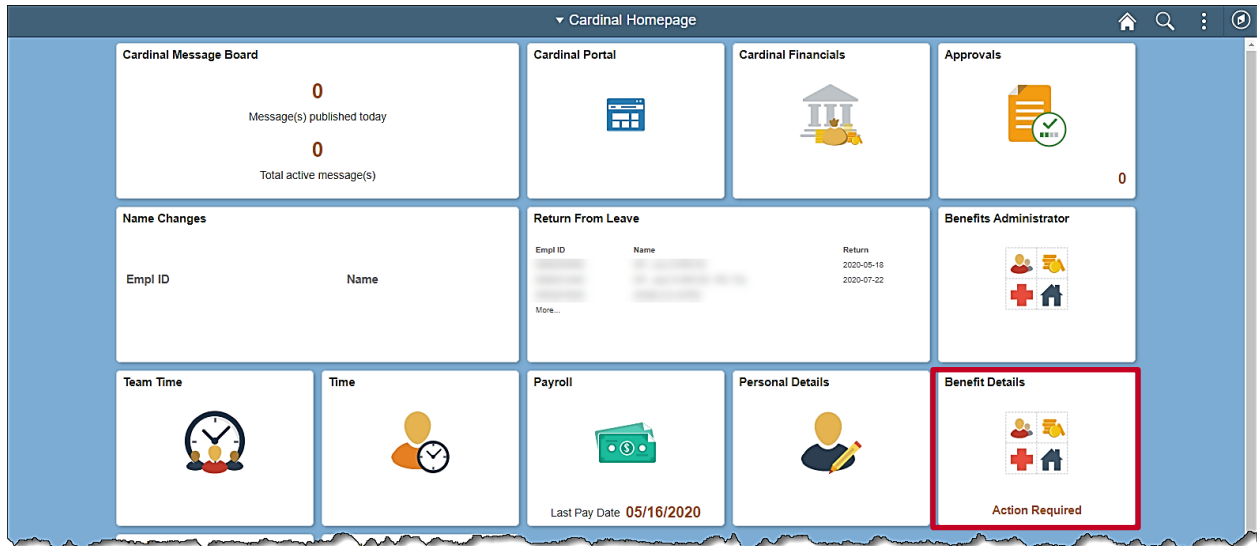
Table of Contents

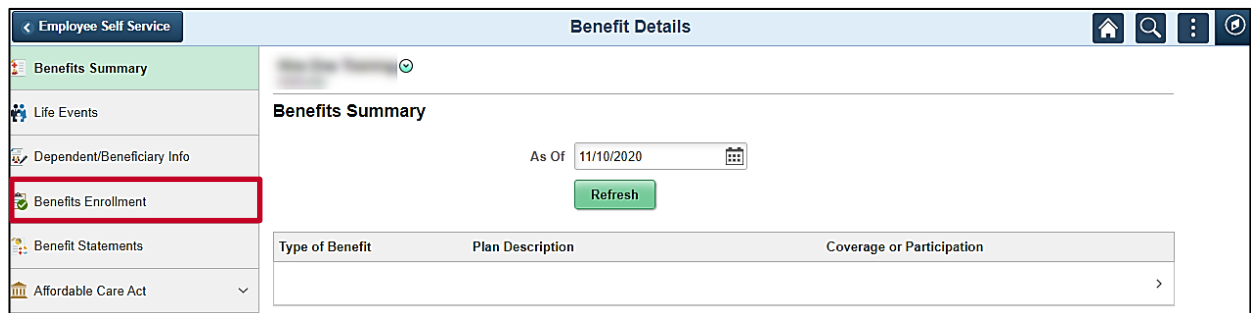## Benefit Enrollment (New Hire)

1. Navigate to the **Benefit Details** page using the following path:

    Homepage > Benefit Details tile

    Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefit Details** page displays.

2. Click the **Benefits Enrollment** list item on the left-hand side of the screen.

The **Benefit Details** page refreshes with the **Benefits Enrollment** information.

3.   Click the **Start** button.

The **Benefits Enrollment** page displays.

4.   Click the **Review** link within the **Medical** Tile to begin the enrollment process.

The **Medical** page displays.

      Note: Employees can add dependents and select medical coverage on this page.

5.   Click the **Add Dependent** button.

The **Dependent and Beneficiary Information** page displays (in this example, there are no dependents currently listed for the employee).

6.   Click the **Add Individual** button to add a dependent to the Employee Record.

The Individual Dependent/Beneficiary Information page refreshes.

7.   Click the **Add Name** button.

The **Name** page displays in a pop-up window.

8.   Enter the dependent's name information. The **First Name** and **Last Name** fields are required.

9.   Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

10. Input the dependent's date of birth in the **Date of Birth** field or select the appropriate Date of Birth using the **Date of Birth Calendar** icon.

11. Select the dependent's appropriate gender from the **Gender** drop-down list.

12. Select the dependent's appropriate relationship using the **Relationship to Employee** drop-down list.

13. Select the dependent's appropriate marital status using the **Marital Status** drop-down list.

14. Verify the **Address** section. If the address is correct, proceed to Step 20.

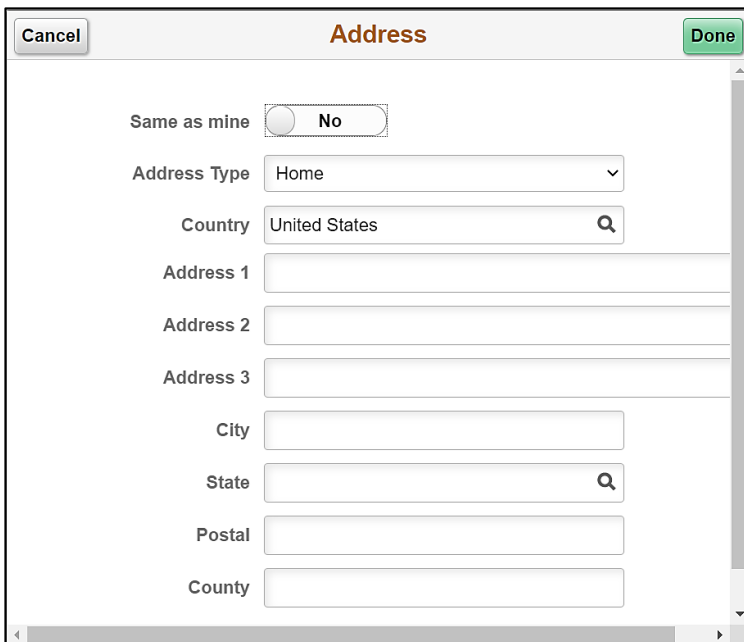15. If the address is incorrect, click the **Address Expansion** icon (**>**) within the **Address** section.

16. The **Address** page displays in a pop-up window.

17. Select "No" in the **Same as Mine** field.

The **Address** page pop-up window refreshes.

18. Input the dependent's address in the applicable fields.

19. Select the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

The **National ID** page displays in a pop-up window.

20. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.

21. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

22. Click the **Add Phone** button.

The **Phone Number** page displays in a pop-up window.

23. Select "Yes" for the **Same as Mine** field or complete the fields, as applicable.

24. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.

25. Click the **Add Email** button.

The **Email Address** page displays in a pop-up window.

26. Select the Email Type from the **Email Type** drop-down list and enter the applicable Email Address in the **Email Address** field.

27. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.
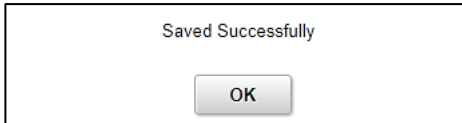
28. Scroll up, as required, and click the **Save** button in the top right-hand corner.

    Note: The record will save without a National ID entered, but Agency Benefit Administrators (BAs) are tasked with obtaining it.

    The **Saved Successfully** page displays in a pop-up window.

    ```
    Saved Successfully

    OK
    ```

29. Click the **OK** button.

The **Individual Dependent/Beneficiary Information** page returns.

Dependent and Beneficiary Information				[x]
Add Individual				
Name	Relationship	Beneficiary	Dependent	
	Child	✓	✓	>

30. Repeat steps 6 – 29 as required until all dependents are added.

31. After all dependent(s) are added, click the **X (Close)** button in the upper right-hand corner.

The **Medical** page returns.

32. Within the **Enroll Your Dependents** section, select the **Enroll** checkbox option for the dependent(s) being added.

33. Within the **Enroll in Your Plan** section, click the **Select** button to select the applicable Benefits Plan.

34. Click the **Done** button in the upper right-hand corner.

The **Benefit Details** page returns.

Note: The **Medical** tile now displays the coverage selected and the number of dependents enrolled along with the Pay Period Cost. The colored bar across the top of each tile changes color after that tile is reviewed. In the above screenshot, the **Medical** tile is green because it was already reviewed; the other tiles have not been reviewed and therefore have a blue bar.

35. Prior to enrolling in the Flexible Spending Medical Account or Flexible Spending Dependent Care Account, an employee must first enroll in the Flex Spending Admin Fee. Click the **Review** link within the **Flex Spending Admin Fee** tile to enroll in the Flex Spending Admin Fee.

The **Flex Spending Medical** page displays.

36. Click the **Select** button to enroll in the Flex Spending Admin Fee.

37. Click the **Done** button.

The **Benefit Details** page returns.

38.   To complete enrollment in the Flexible Spending Medical Account, click the **Review** link within the **Flex Spending Medical** tile.

The **Flex Spending Medical** page displays.

39.   The **Waive** option is selected by default. If enrolling, click the **Select** button next to the **Medical Flex Spending Account** plan.

The **Flex Spending Medical** page refreshes with the **Contribution Amount** section displayed.

40.   Enter the applicable amount in the **Annual Pledge** field.

41.   Click on the Flexible Spending Account Worksheet.

The **Flexible Spending Account Worksheet** page displays in a pop-up window.

42. The **Your New Annual Pledge** field auto-populates based upon the value entered in the **Annual Pledge** field within the **Contribution Amount** section of the **Flex Spending Medical** page.

43. Click the **Calculate** button to populate the remaining fields.

44. As desired, update the amount entered in the **Your New Annual Pledge** field and click the **Calculate** button to re-populate the remaining fields.

45. Click the **Done** button when finished.

The **Flex Spending Medical** page returns.

46. Click the **Done** button.

The **Benefit Details** page returns.

47. To enroll in Flex Spending Dependent Care, click the **Review** link within the **Flex Spending Dependent Care** tile.

The **Flex Spending Dependent Care** page displays.

48. The **Waive** option is selected by default. Click the **Select** button next to the **Dependent Care FSA** plan to enroll in **Flex Spending Dependent Care**. Repeat steps 20-23.

49. Click the **Done** button.

The **Benefit Details** page returns.

50.   Click the **Submit Enrollment** button.

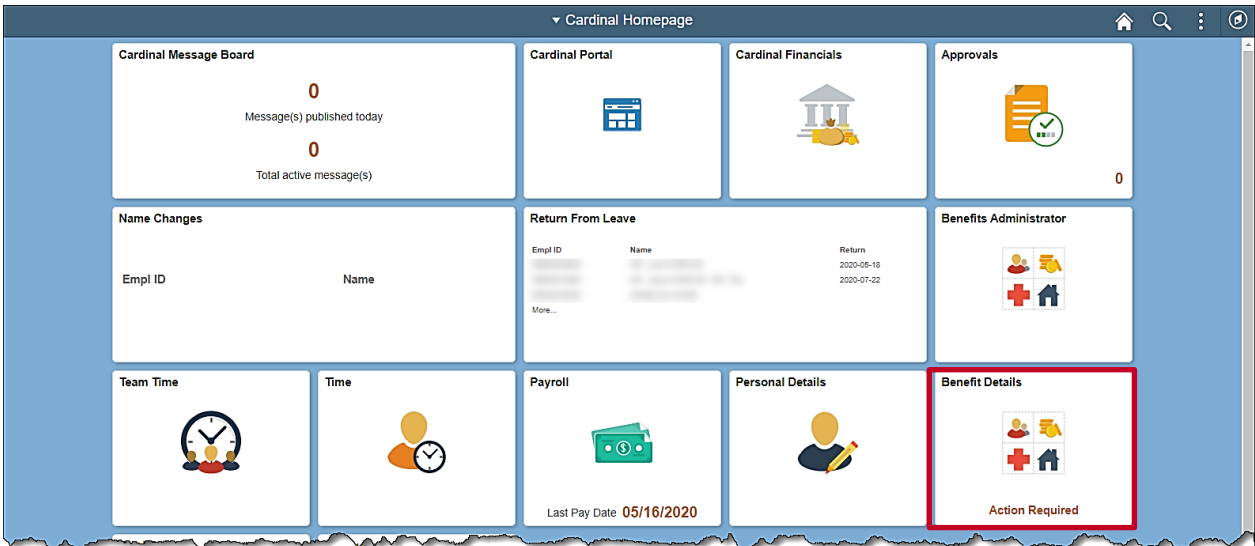The **Benefits Alerts** page displays in a pop-up window.

51.   Click the **Done** button.

Note: Alternatively, click the **View** button to return and review the Benefits Enrollment information.

The **Benefit Details** page returns, and enrollment is now complete.
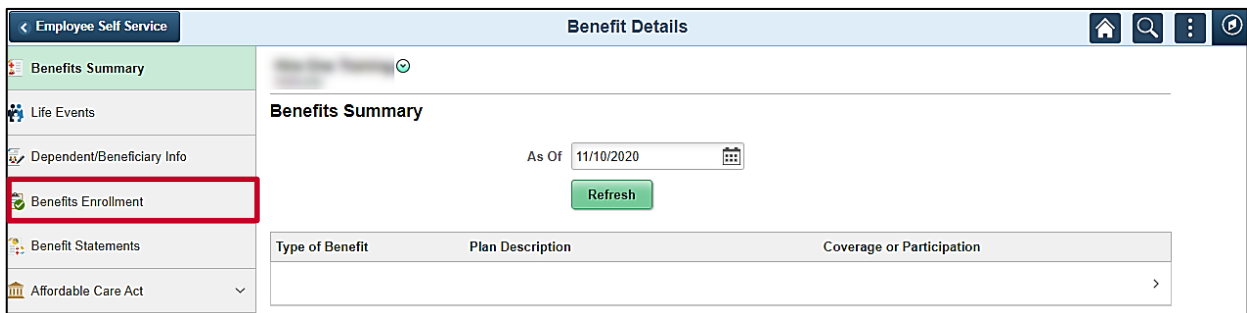
Benefits Enrollment (Open Enrollment)

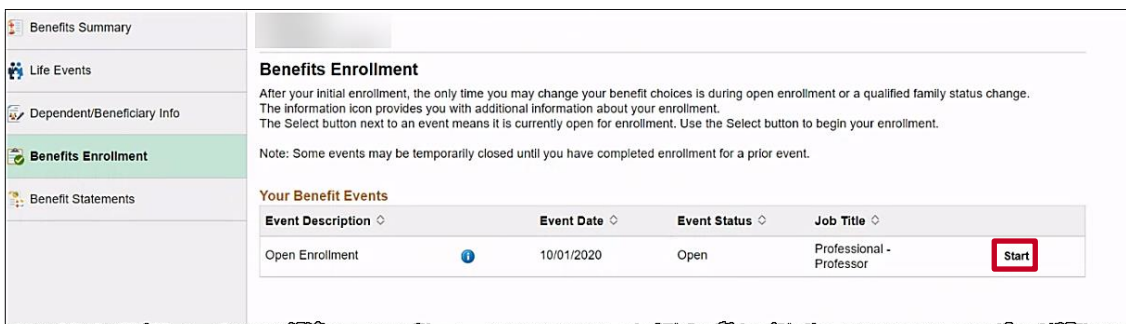1. Navigate to the **Benefit Details** page using the following path:

   Homepage > Benefit Details tile

   Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefits Summary** page displays.

2. Click on **Benefits Enrollment** on the left-hand menu.

3. On the **Benefits Enrollment** page, click the **Start** button next to the Open Enrollment Benefit Event listed.

The **Benefits Enrollment** page displays.

4. To complete the Benefit Enrollment process, follow Steps 4-33 from the **Benefit Enrollment New Hire** section above.